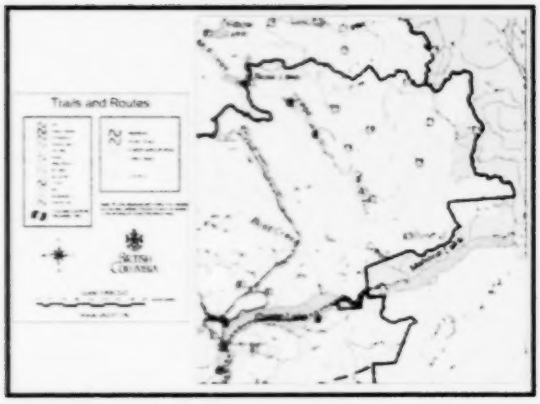
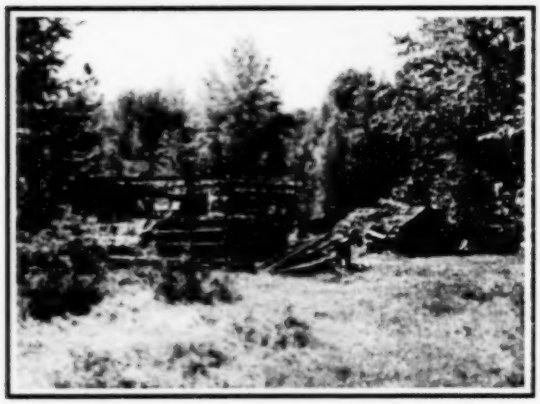
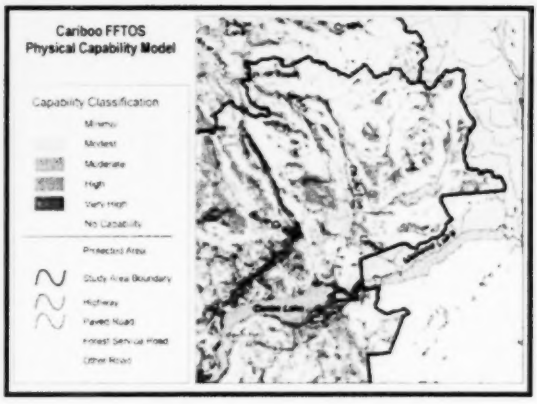
FOREST & FISHERIES TOURISM OPPORTUNITIES STUDY FOR THE 100 MILE & HORSEFLY FOREST DISTRICTS OF BRITISH COLUMBIA: PROJECT REPORT

MARCH 2000







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Ministry of Small Business, Tourism & Culture

Funding Partners:
Fisheries Renewal British Columbia
Forest Renewal British Columbia
Ministry of Small Business, Tourism & Culture
Northern Development Commission

Prepared by:
Drew North Consulting Group
Clover Point Cartographics Ltd.
Ecogistics Consulting

BRITISH COLUMBIA

THE 100 MILE & HORSEFLY FOREST DISTRICTS OF BRITISH COLUMBIA TOURISM OPPORTUNITIES ANALYSIS

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EXECUTIVE SUMMARY

This study was commissioned by a combination of stakeholders for the purposes of gaining information to improve on existing Tourism Resource Inventory and Forest Recreation Resource Inventory data, and enable government to support the efforts of individuals, municipal governments, First Nations, and tourism and recreation associations to:

- diversify local economies;
- maintain access to recreational resources for local residents; and,
- minimize conflicts between resource users

The ultimate value of this project is in identifying key opportunities and actions to assist in the priority setting of key players in tourism planning, and providing further direction to communities and organizations involved in tourism development in the South Cariboo.

The study area is located in the central interior of British Columbia (refer to Diagram 1.2) with the southern boundary about 350 km (four hours drive) northeast of Vancouver. The specific boundaries of the study area are consistent with the boundaries of two forest districts (100 Mile House and Horsefly FDs) in the interior of British Columbia, and are contained in a portion of the Cariboo-Chilcotin-Coast tourism region, one of six tourism regions in the province. It covers a total land base of 2,048,211 hectares or 20,482 square kilometres. The largest town is 100 Mile House with a population of 17,000 (trading area) and an estimated total population of 24,000.

Identification of Opportunities

The determination of tourism opportunities involved factoring in resource, social, and economic considerations, and featured a unique combination of primary and secondary research methodologies, explained further in this report.

Ten tourism "products" were identified for closer evaluation in the product analysis, as follows:

-- freshwater fishing
-- hiking
-- wildlife viewing/photography/natural history
-- snowmobiling
-- destination lodge/resort
-- Nordic skiing
-- horseback riding (trail)
-- heritage/culture
-- lake boating
-- mountain biking

Freshwater Fishing

Fishing continues to be a very popular activity for locals and tourists in the study area, and has become synonymous with the lifestyle of the Cariboo. The thousands of lakes and extensive stream network provide many spectacular settings for fishers of all levels of ability.

The 23 largest 'very high capability' areas are highlighted on a study area map in **Appendix C-2**, with concentrations in the larger lakes (Quesnel, Canim, Green, Sheridan, Bonaparte, and Lac La Hache), along the Horsefly and Quesnel Rivers and Big Bar Creek, and around the towns of Likely,

Horsefly, Lac La Hache, and 100 Mile House.

Hiking

The study area offers excellent hiking/walking experiences due to the varied and spectacular terrain. The capability mapping generated 23 'very high capability' areas spread across the study area, with the largest areas being found in the Interlakes, 108 Mile Ranch, Ruth Lake/Forest Grove, Horsefly and Likely areas. These are highlighted on a study area map in Appendix C-2. Local writer Colin Campbell identifies 45 hiking trails, almost all in the study area, in his book "Trails of the Southern Cariboo" -- several of which are also suitable for mountain biking and horseback riding. Many of these are rated "easy hikes" and well suited for the soft adventure market interested in walking in the wilderness.

Wildlife Viewing/ Photography / Natural History

For the purposes of this product analysis, these three areas were combined due to the similar criteria applied in the capability modelling process. In fact, each area represents a special interest area for large and lucrative market segments within the overall "soft adventure" market. The modelling revealed 23 "very high capability" areas (see Appendix C-2) with concentrations around large lakes, the Lac La Hache-100 Mile House corridor, the Interlakes, Likely, and Horsefly.

Snowmobiling

The study area includes some exceptional riding. The rolling terrain throughout much of the study area is popular for the trail-based touring snowmobiler, while the more mountainous terrain in the northern and eastern parts of the study area appeals to the more avid alpine rider. The capability modelling identified 24 "very high capability" areas (see Appendix C-2) with the largest concentrations around the Lac La Hache, Interlakes, and Green Lake areas.

Destination Lodge/Resort

There is a wide variety of existing accommodation in the study area which provide an adequate base of activities and services for the guest, and several of which meet the traditional marketplace definition of a "destination lodge/resort" including the guest ranches and full-service properties. The range on product and service quality at these properties is vast. Many of the smaller properties, referred to as "mom and pop shops" due to the frequency in which they are family-owned and operated, offer rustic, cabin-style accommodation for guests who will "base" there for their holiday and explore nearby communities and area attractions. Based on the capability modelling, there are 27 "very high capability" areas scattered throughout the study area, mainly adjacent to lakes or other waterways (see Appendix C-2).

Nordic Skiing

Parts of the study area have developed and maintained networks of trail for nordic skiing. The 99 Mile-100 Mile House-108 Mile Ranch area in particular has invested in and developed world-class ski trails, and the area has become well known among the avid nordic skier market. The major investment was done 15-20 years ago and at a time when there was less competition -- both in terms

of alternative destinations, and organized events. This has affected attendance numbers at the annual Marathon held in February, which is now seeing about one third of attendance numbers in the past. A current project of the 100 Mile Cross-Country Ski Club involves connecting the 99 Mile ski area with 100 Mile House at the Red Coach Inn is scheduled for completion this year (2000) and may stimulate more skier interest in this area. The capability mapping showed a large number of 'very high capability' areas within the study area, with the largest areas and highest concentration of areas in the more rolling terrain found in the 100 Mile House Forest District (see Appendix C-2).

Horseback Riding

Like fishing, horseback riding is synonymous with the culture of the Cariboo. Ranching is a key industry in the study area, and the prevalence of working cattle ranches and large farms is obvious and appealing to guests of the South Cariboo. This cultural appeal is strengthened by its spectacular setting and rolling terrain which covers a large portion of the study area. Over 25% of the study area rated 'very high capability' for horseback riding, with a large portion of this in the southern part of the study area where gently rolling terrain and open forests are prevalent. The 15 largest 'very high capability' areas are illustrated in Appendix C-2.

Heritage / Culture

There is a rich gold rush history which has shaped many facets of the study area. Towns like 70 Mile House, 100 Mile House, and 150 Mile House were all named for their relative distance from Lillooet along a popular travel route to Barkerville, where thousands of prospectors headed in search of gold, following the 1849 Gold Rush in California. Quesnelle Forks, a deteriorating ghost town of about 20 buildings just west of Likely, provides the largest surviving legacy of this interesting era, along with the roadhouses and log cabins scattered throughout the study area. Museums in Clinton, Horsefly, and Likely also showcase archives and remnants of he gold rush. There have been considerable local efforts applied recently to revitalizing the "Gold Rush Trail", which runs through the middle of the study area, and marketing the heritage tourism aspect of the Cariboo.

Lake Boating

The sheer number of lakes in the study area suggest tremendous potential for lake-based activities. While the study area boasts an exceptional number of lakes, the 21 major lakes ranked as having 'very high capability' areas are displayed in Appendix C-2. The largest and most spectacular lake is Quesnel Lake located in the northern portion of the study area, which rated high overall in the modelling with very high concentrations mostly along the west arm. Houseboating was suggested as a possible development option which could potentially integrate with any marine park.

Mountain Biking

The study area has hosted several highly competitive mountain biking events, and locals involved in the sport say the Cariboo has some of the best riding anywhere in the world. The variety of terrain offers something for all levels of riders from novice to expert. Numerous recreational trails suitable for mountain biking have been developed throughout the study, most notably the "Adventure Series" project coordinated by the Cariboo Chilcotin Coast Tourism Association with support from Forest Renewal B.C. and Human Resources Development Canada. The capability modelling

revealed a total of ten 'very high capability' areas for mountain biking, and these are illustrated in Appendix C-2.

Strengths and Weaknesses

Based on the operator survey, capability modeling results, previous documents and reports, and the study team's knowledge, the following summarizes the overall strengths and weaknesses of the general tourism product in the study area:

Strengths:

- The pristine setting and natural beauty of the area combined with a quiet, relaxing environment enhances the quality of all touring experiences and outdoor activities
- Strategic location between Vancouver and the Rockies, and the lower US & Alaska
- Great fishing on beautiful, uncrowded lakes and streams
- Variety of outdoor activities facilitated in part by existing trails
- Numerous provincial parks
- Seasonal weather provides variety of activities to be offered i.e. product options
- Rich history in the area including the Gold Rush Trail, Quesnelle Forks, roadhouses and pioneer homes plus nearby heritage attractions (Barkerville and Hat Creek Ranch)
- Expanded trails system for outdoor activities, some connecting with lodges and resorts
- Extensive network of dormant logging roads for backroads exploration
- Good value for dollars spent relative to other competing travel destinations

Weaknesses:

- Inconsistent quality standards among operators which affects perception of the destination among past guests
- Insufficient signage and road maintenance standards on backroads to many operators
- Older properties may not be suited for changing travel markets
- Access links to certain properties
- High turnover in ownership/management and lack of related experience
- Low market awareness of destination and extent of things to do
- Unreliable weather
- Government restrictions limiting development of certain commercial activities (e.g. snowmobiling)
- Seasonality of business affects financial viability of operation

Concerns

Concerns regarding land use and resource management were raised frequently throughout the project as a key issue or threat to tourism in the study area. The report discusses this further, along with marketing given its importance to the realization of all the aforementioned opportunities and frequency in which it was mentioned in the tourism operator survey.

1 INTRODUCTION

The tourism industry in British Columbia has experienced steady growth in recent years and is now recognized as one of the two largest industries in the province in economic terms, along with forestry. The industry generated over $9 billion in revenue in 19991, accounting for about 113,000 employed positions and many self-employed positions throughout the province2. Tourism British Columbia (hereafter referred to as TBC) predicts continued steady growth for the industry, and there is excellent potential to develop the tourism industry in the study area, as well as throughout the province. Market demand for the type of travel experience offered in the study area and British Columbia continues to grow, as baby boomers are getting older and travelling more frequently. The desire among a growing urban-based population to get out of the city and back to nature is one of several key trends stimulating this increase in demand.

The study area is located in the central interior of British Columbia (refer to Diagram 1.2) with the southern boundary about 350 km (four hours drive) northeast of Vancouver. The specific boundaries of the study area are consistent with the boundaries of two forest districts (100 Mile House and Horsefly FDs), and are contained in a portion of the Cariboo-Chilcotin-Coast tourism region, one of six tourism regions in the province. It covers a total land base of 2,048,211 hectares or 20,482 square kilometres[3]. The largest town is 100 Mile House with a population of 17,000 (trading area)[4] and an estimated total population of 24,000.

The primary industries are forestry, ranching, tourism, and mining. Regionally, the area is undergoing considerable transition as it works to diversify and stimulate a sluggish economic base which is heavily dependent on primary resource industries, particularly forestry. Tourism, on the other hand, has experienced steady growth and its economic potential for the region is gradually becoming realized. The estimated value of tourism in the study area is $110 million[5].

The key motivation for pleasure travellers to and through this area is to enjoy the spectacular scenery and pristine environment, participate in a variety of outdoor activities including fishing, hiking, biking, and riding horse, and enjoy the country culture synonymous with the Cariboo. There is a strong western flavour to the southern portion of the study area, with a concentration of guest ranches in the Clinton area. To the east and north is a heavy concentration of fishing lodges and small resorts which cater to the family and fishing markets of North America and parts of Europe. In addition, the area is located between two key heritage attractions -- Barkerville Historic Town and Hat Creek Ranch -- and encompasses a major section of the Gold Rush Trail (Highway #97).

Despite an encouraging economic outlook, the industry faces serious challenges as it continues to respond to increasing demand for the super, natural travel experiences which have become the signature tourism product for our province. In addition to identifying key opportunities for tourism, this report identifies key issues and constraints which threaten the potential for tourism in the study area and our province.

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[1] Source: Tourism British Columbia, Newsletter #64, March 24, 2000

[2] Source: Ministry of Small Business, Tourism & Culture, web-site, March 29, 2000

[3] Figure derived from digital data provided by Ministry of Forests

[4] Source: South Cariboo Chamber of Commerce

[5] Based on 40% of regional total of $276 million in 1999 per Cariboo-Chilcotin-Coast Tourism Association

1.1 Study Purpose

This study was one of six simultaneous studies conducted in various areas of the province by the Ministry of Small Business, Tourism & Culture (hereafter referred to as MSBTC) and its funding partners. The study was commissioned for the purposes of gaining information to improve on existing Tourism Resource Inventory and Forest Recreation Resource Inventory data, and provide technical input to government to assist in their support for efforts of individuals, municipal governments, First Nations, and tourism and recreation associations to:

- diversify local economies;
- maintain access to recreational resources for local residents; and,
- minimize conflicts between resource users

The ultimate value of this project is in identifying key opportunities and actions to assist in the priority setting of key players in tourism planning, and providing further direction to communities and organizations involved in tourism development in the South Cariboo.

1.2 Tourism and Land Use Planning

The emphasis placed on tourism planning in the study area has increased recently, due in part to intensive land use planning processes underway, specifically the implementation of the *Cariboo-Chilcotin Land Use Plan* (hereafter referred to as CCLUP) through sub-regional plans. The issue of land use planning and its implications for tourism in British Columbia have been an expressed concern for years. At the annual B.C. Tourism Industry Conference held in February 2000, the industry ranked land use and marketing as the top two issues of concern to the tourism industry in this province.[6] Given the importance of land use planning to the future of tourism and corresponding opportunities, a brief chronology of recent events is therefore useful to put this issue into context with the study area.

The provincial government commenced an extensive public consultation process in 1992 through the Commission on Resources and the Environment which culminated in 1994 with the CCLUP. This Plan required extensive compromise on the part of many negotiators including tourism, in order to reach consensus on how the land and its resources are to be used. These compromises and their implications towards tourism are addressed later in this report.

At about the same time as the CCLUP was released, a Resource Planner was established by the MSBTC for the Cariboo-Chilcotin region. This decision to locate a tourism planner in the Cariboo region was due in part to an effective lobby campaign launched by the tourism industry, in order to raise local awareness of tourism and its importance in land use planning.

The present status of land use planning in the study area is that the CCLUP is a higher level plan and provides direction for sub-regional plans, which are at various stages of completion throughout the region. In the study area, one of the two sub-regional plans (hereafter referred to as SRPs) is near completion for the 100 Mile Forest District, and the other is also scheduled for completion in the year 2000 for the Horsefly Forest District. These SRPs have important implications for tourism, awareness of which is critical for future tourism development. Refer to Section 6.1.1 of this report for further details.

[6] Council of Tourism Associations

For the purposes of this study, the targets set by the CCLUP and implemented through the sub-regional plans are treated as a filter or *suitability layer* to be considered in the evaluation of tourism opportunities.

1.3 Scope & Methodology

Given the high priority placed to date by the MSBTC on land use planning and resource-based tourism planning, this study maintained a heavy emphasis on this aspect. Prescribed components, most notably the capability modelling and updating of a tourism resource inventory were major elements of this study and reflect this emphasis.

The product and market analysis, while documented in separate sections of the report, were inter-related in that the product analysis factored in the varying needs of different market segments. For example, the product assessment of mountain biking, could be weak for a novice, soft adventure market due to rugged terrain, a high risk factor, and remoteness; whereas, these could be selling features for the more avid biker market. On the other hand, a series of signed, mapped trails connecting with various lodges along relatively flat terrain would represent a strong product for the soft adventurer and not necessarily the avid biker. This product-market relationship factors into the identification of key opportunities, and in the development of the community tourism development profiles.

The identification of key tourism opportunities was based on a set of resource, market, and social criteria, explained further in Section 1.3.6. Key issues and constraints were also assessed on a study area wide basis, and are summarized in Section 6 of this report, followed by a series of corresponding recommendations providing potential solutions.

This study represents a step towards a more integrated approach to tourism planning, placing an increased emphasis on combining market and social factors with resource analysis and physical characteristics of the host environment. This adds value to the findings for purposes other than land use planning, including product and market development. A specific recommendation is provided in Section 6 as a further step towards a more integrated approach to tourism planning and development.

The key sources of information and methodologies used in this study are summarized in the remainder of this section.

1.3.1 Local Input & Public Consultation

As outlined in the project terms of reference, strong emphasis was placed on input from local individuals and organizations with an interest in tourism.

The first project planning meeting was held on November 3 in Williams Lake and included the formation of a local steering committee (referred to as Industry-Government Partnership Team or IGPT) which met four times through the course of the project.

The study team also formed an advisory group, and established key contacts as *product experts* for each of the ten identified product areas as well as *community contacts* for each of the nine community areas. In addition to meetings with these people, public information sessions, open houses, and focus groups were held during various stages of the project.

Refer to Appendix E-1 for a detailed list of all people contacted during the project.

1.3.2 Literature Review & Digital Data Sources

The project involved an ongoing collection and review of related documents including community development plans, economic development strategies, land use plans, marketing plans, and previous tourism studies. In 1995, the *Cariboo-Chilcotin Tourism Resource Inventory* (or *TRI*) was completed. The TRI differed from this study (*Forest Fisheries Tourism Opportunities Study* or *FFTOS*) in a number of areas. First, the scale of mapping in the TRI was intended for use at a strategic level (1:250,000 scale mapping) rather than a planning level (1:20,000 scale mapping). The FFTOS also applied features-based tourism capability modelling to identify areas of high potential for tourism development. Finally, while the TRI identified issues important to tourism operators and areas of tourism significance, the FFTOS incorporated economic and social considerations to rigorously identify considerations for developing specific and general tourism opportunities.

There was also an extensive amount of digital data collected from government sources including the Ministry of Forests and Ministry of Environment for various forms of analysis using Geographic Information System (or GIS) methods.

It was observed that an extensive amount of planning work has taken place, particularly land use planning, and that a nominal amount of tourism planning and research has been done for the purposes of economic development and diversification. The amount of existing information specific to tourism for the study area level was very limited, and in many cases regional and/or provincial findings had to be applied.

Refer to Appendices E-2 and E-3 for a detailed list of printed and digital information sources.

1.3.3 Operator Survey

The methodology prescribed by the MSBTC to collect tourism operator data was a self-administered questionnaire mailed to a defined sample frame. The survey tool was received by the consultant team on November 15 and mailed to all known eligible recipients on November 24, 1999. While a deadline of December 10 was referenced in the survey, all returned surveys received by the consultants throughout the duration of the project were accepted and included in the findings.

The survey tool itself consisted of 22 questions[7] versioned to a sample frame of businesses in the study area and classified as tourism operators based on three categories: accommodation, attractions, and activities/tours. From this definition, a total of 191 operators were identified in the study area and mailed a personalized five-page questionnaire, map (except those operators not requiring verification of their location and/or operating area), cover letter from the MSBTC, and postage-paid return envelope. A sample questionnaire is included in Appendix B-1.

Of the surveys sent, five were returned unopened resulting in 186 eligible recipients. Diagram 2.0 illustrates the geographic location of these operators within a map of the study area.

A total of 81 surveys were received, representing a 44% response rate, due in part to an extensive follow-up campaign consisting of phone calls, faxes, and open houses. Several recipients complained about the questions not being relevant to their type of operation. Information collected in the received surveys was used to update the original MSBTC tourism operator database provided to the consultant team at project commencement. Extensive research of secondary sources such as the British Columbia Accommodation Guide and British Columbia Product Guide

[7] Two optional questions were versioned specific to golf courses and ski resorts; these are included in the sample questionnaire in Appendix B.

provided much detailed data regarding contact information and type of operation for tourism operators who did not respond to the survey. Each tourism operator included in the updated and enhanced database was verified as being "in business" at the time this survey was conducted. *Appendix B-2* provides an alphabetic listing of all tourism operators (eligible candidates) along with 79 corresponding fields of related data as included in the updated database provided to the MSBTC at the completion of the project. This database was provided in Microsoft Access format, and components were integrated into the ESRI Arc/Info Geographic Information System (GIS) coverages as specified in the project terms of reference, the latter of which provided the majority of data to define "existing (tourism) use" in the mapping portions of the study.

In addition to collecting data specific to their business as summarized in the aforementioned database, operators were asked to identify the strengths and weaknesses of their tourism sector, as well as opportunities and constraints for the tourism industry in general[8]. The strengths/weaknesses portion of this data was analyzed separately and incorporated into the key product analysis in Section 2. The opportunities/threats responses were factored into several areas including the identification of key opportunities (Section 4), key issues and constraints (Section 6.1), and final recommendations (Section 6.2). Responses were also factored into the preparation of the community tourism development profiles (see Section 5), and are summarized by community area in Appendix D-1.

1.3.4 Product Analysis

The identification of tourism opportunities commenced with an analysis of existing tourism "products" in the study area. This was a selective rather than comprehensive product analysis, where ten products were assessed in detail with particular consideration given to their characteristics and development potential relative to three market segments: ecotourism, soft adventure, and freshwater fishing. Heavy emphasis was also placed on evaluating the study area in terms of its resources and the physical capability to support product growth.

Ten tourism "products" were identified for closer evaluation in the product analysis, as follows:

-- freshwater fishing
-- day hiking
-- natural history/photography/wildlife viewing
-- snowmobiling
-- destination accommodation/lodge
-- nordic/backcountry skiing
-- trail riding (horseback)
-- heritage/culture
-- lake boating
-- mountain biking

These ten were chosen by the study team, in conjunction with the project steering committee, from a list of 45 *products/activities* provided by the MSBTC, based on their knowledge of the existing and potential availability of product, existing and potential market demand, and local input. For purposes of report clarity, these products are hereafter referred to as *key products*.

This analysis commenced with an update of existing TRI data derived from the operator survey and literature review, to define the product in terms of "existing use" for land use planning. Diagram 2.0 illustrates the existing tourism operators by location within the study area.

Following this, the updated data was used to analyze ten tourism products in detail using a GIS

[8] It is important to note that the use of prompts in this portion of the survey tool produced a bias in responses. this bias was considered by the consultant team during the subsequent analysis.

technique called *capability modelling*, as explained in Section 1.3.5.

1.3.5 Capability Modelling

A detailed assessment of nine of the ten key products was conducted using a GIS mapping technique called "capability modelling".[9]

The entire study area was assessed in terms of physical capability to support each key product and rated as either very high, high, moderate, or modest capability. High or very high capability areas can be most simply defined as locations that contain the combination or concentration of attractors (features) which have the physical capability to support a defined tourism product. The capability of these areas may be further supported by selected setting modifiers. Each of these attractors are assigned point values based on pre-determined weighting criteria, which results in a ranking of very high to modest capability based on the total points awarded a given area. The procedure used to identify high capability areas involved a product by product analysis on a 1:20,000 scale, the findings of which are summarized in Section 2, and again later in Section 4.

The tourism product capability models are derived through combining up to 47 variables. Variables consist of tourism features, such as heritage sites or campsites, and resources, such as wildlife habitat. These variables have been divided into *attractors* and *setting modifiers*. *Attractors* have been assigned a weighted value in relation to their importance to the products. A GIS process called *buffer* was applied to attractors that consisted of points and lines. A *buffer* assigns an area surrounding the feature with the same value as the feature, in this case the *buffer* assigned varied between 500 meters and one kilometer.

Attractors were overlayed using a GIS process called *union*. Values were summed for *attractors* which co-existed "on top" of each other. For an area to become classified as having high or very high potential it required a minimum number of *attractor* "points." Areas that did not meet the minimum point requirement could be boosted to high or very high capability through the presence of *setting modifiers*, such as a favourable biogeoclimatic zone or the presence of a trail. Please refer to Appendix C for a detailed, product by product explanation of capability modelling.

The capability modelling process was a major component of this project, intended to assist in analyzing tourism products and identifying product development opportunities. The study team observed that the established protocol for tourism product capability analysis has a number of inherent constraints, and each model has some specific limitations. Specific model limitations are described in Appendix C-1. General constraints focus on three general areas: data quality, model inputs and weights and exclusion of suitability criteria.

1.3.5.1 Data Quality:

The accuracy of the models was constrained by a lack of consistent data throughout the regions,

[9] Heritage/culture was subsequently not modelled for capability. A decision was made in February by the Client to withdraw capability modelling for heritage/culture in all TOS studies throughout the province. The decision was made because there has been no evaluation of the suitability of historic or archaeological sites for tourism. The Archaeology Branch of the Ministry of Small Business, Tourism & Culture was concerned that modelling this product and identifying locations which may have potential to support cultural/heritage tours may have a negative impact on the resource.

missing (site-specific) data, and inaccurately located data. Since the capability models are feature-based, the accuracy of the outputs (identification of high capability areas) is directly related to the accuracy of the inputs.

Some key data layers were not available for this project. These included consistent scenic quality, wildlife habitat capability, and lakes classification. The 100 Mile Forest District had several layers of data, developed for that SRP, that were not available in the Horsefly Forest District. For instance, the visual quality objectives were not yet finalized for the Horsefly District. Classified lakes in the100 Mile House District were available and included as an input layer for many of the models. The same level of detail was not available for the Horsefly Forest District. Where known, lakes stocked by the Ministry of Environment (or MELP) were included in the capability models as a substitution.

Wildlife habitat data was available for the MELP Cariboo Region but not available for the Kamloops Region. This resulted in the southern ¼ of the study area having little wildlife habitat data. Limited information was made available through the 100 Mile House Sub-Regional Planning Process.

The consultant team believes it is probable that some of the identified tourism features were mapped inaccurately or not recorded at all. The terms of the project did not allow for ground truthing of the feature locations, so the consultant team relied on data verification from the tourism operators and other Advisory Team members to verify data accuracy, as well as the team's inherent knowledge of the study area. Heritage site locations are one layer that is particularly weak. Layers such as boat ramps and Forest Service Sites are considered complete and accurately mapped to 1:20,000 map scale. Other data input layers, such as undeveloped campsites, are incomplete. Several may not be accurately geo-referenced. Some tourism facilities have been accurately located while others were mapped at a "best guess" location.

1.3.5.2 Model Inputs and Weighting:

The decision of which data layers to include in each model was based on the knowledge of the consultant team and input from industry experts. However, the decision to include or exclude specific data inputs in some models may be open to interpretation. Furthermore, certain physical barriers may not have been considered. For instance nordic skiing requires an equal mix of flat, uphill and downhill terrain in a specified sized area to be considered physically viable for a commercial operation. Information on the location of features that may inhibit an activity from occurring was not factored into most models due to the poor quality of those data layers (e.g. industrial site locations, river canyons restricting river activities etc).

1.3.5.3 Suitability versus Capability:

The models display the land's capability to support various tourism products based in several types of features and resource based input layers. None of the physical capability models consider suitability issues such as carrying capacity (physical and social) and the socio-economic viability of the product or of the high capability polygon. Suitability layers include management zones (parks, CCLUP, sub-regional plans, and designated backcountry zones), private land / land ownership, existing tenures, prime wildlife habitat, and scenic quality.

In consideration of the aforementioned constraints and limitations, emphasis on the findings of this modelling approach was adjusted accordingly. *Section 6* reiterates this observation and provides a corresponding recommendation for consideration in future applications of tourism product capability modelling. *Appendix C-1* provides further details on Capability Modelling.

1.3.6 Market Analysis

Findings of this analysis were based on secondary data sources including recent visitor studies, visitor information statistics, and related reports as well as the study team's knowledge of the tourism marketplace. Consideration was also given to the current marketing strategies of key players including the CTA and TBC. Emphasis was placed on three market areas -- ecotourism, adventure tourism, and freshwater fishing -- as outlined in the project terms of reference.

1.3.7 SWOT Analysis

Another component prescribed by the MSBTC to refine tourism opportunities was a *Strengths-Weaknesses-Opportunities-Threats* (SWOT) Analysis. Unlike the other study components, the consultant teams were allowed considerable flexibility in terms of their approach to the SWOT analysis. Based on the current status of tourism planning in the area and priorities of the investing partners, it was decided that a regional approach be taken in order to identify key opportunities where the area could benefit as a whole.

The SWOT analysis combined findings of the product analysis and resource assessment of the study area (Section 2) with the market analysis (Section 3) and community analysis portion of the community tourism development profiles (Section 5).

The basis on which these opportunities were identified and evaluated was a series of resource, market, and social criteria, summarized as follows:

1) RESOURCE QUANTITY: How extensive is the resource base in terms of high and very high capability for various product areas? What is the ability of the resource base to support the product?

2) FEATURE QUALITY: What is the quality of the resource/features from a tourism perspective?

3) LOCATION QUALITY: What is the quality of this location (compared to others) and its proximity to optimum features for the proposed opportunity?

4) UNIQUENESS: How unique is this opportunity compared to the rest of B.C.? How does the resource relate to similar resources in the province? Is the experience repeatable?

5) SEASONALITY: How many months are the resource/s required for the proposed opportunity available for tourism use at this location? What it its potential during shoulder and winter seasons?

6) ACCESSIBILITY: How accessible is the resource for this opportunity? What is the distance from a population centre? What are the transportation options to the resource? Is there appropriate access? What about market access? What are the costs and time associated with linking the market to the product?

7) SAFETY: Does the location of the resource or surrounding terrain present safety concerns (avalanche, high winds, floods, etc)? Does the opportunity pose any exceptional risks to the user group?

8) COMPATIBILITY: Does the opportunity complement existing products/operators in the area or is it seen as duplication or increasing competition?

9) ECONOMIC BENEFIT: How much money would the visitors spend in the study area? In the province? Would the opportunity generate new jobs? Seasonal or year round? Would this

opportunity affect the profitability of existing operators? Does this opportunity extend the tourism season?

10) EXISTING MARKET: Does the user group come to the study area/B.C. now? How large is the present market and what are their spending habits? What market share does the study area receive of B.C.'s market share? How much of this market is generated through/influenced by the travel trade?

11) DEMAND TRENDS: Has travel demand for this opportunity area increased recently? Will it remain strong or continue to grow in the future?

12) MARKET PRIORITY Is the user group a target market for key marketing agencies (e.g. CCCTA, Tourism BC, CTC, inbound travel trade)? Are these efforts likely to increase demand for the study area?

13) COMMUNITY SUPPORT: Has the opportunity, generally or specifically, been included in previous plans? In minutes of meetings? Is there a community group or individual currently promoting the development of this opportunity? Does the development fit with existing community vision or goals (formal such as OCP or informal such as broadly supported goals)? Would it receive support from local government? Are there any community constraints on development of the opportunity?

14) ORGANIZATIONAL CAPACITY: Is there an organization, club, company, or individual who will take a leadership role in this opportunity? Will local government take an active role or at least support development of the opportunity?

15) LOCAL LABOUR: Do the local labour force and entrepreneurs have the skill sets to capitalize on other opportunities resulting from this? If lacking, are there opportunities for capacity building?

16) INFRASTRUCTURE: Is additional infrastructure (water, waste treatment, road maintenance/signage, telecommunications, etc) required and if so what will it cost? Are there sources to pay for it?

The results of the SWOT analysis influenced findings throughout the study process, and assisted in the determination of key opportunities and threats, the findings of which are disseminated later in this report. The literature review, public consultations, capability modelling, and operator survey were key input sources for responses to the above questions. Various potential opportunities were assessed subjectively by the consultant team using this set of criteria as a guide to identify the key opportunities and constraints.

1.3.8 Community Tourism Development Profiles

For the purposes of this study, nine community areas were defined (per Diagram 1.2) by the study team based on consideration of market access, theme development potential, and previous studies.

Each profile was prepared based on a combination of secondary and primary data sources. Secondary sources included existing studies and area-specific documents such as community and/or economic development strategies and official community plans, as well as existing research in the area of tourism planning and community development. The primary data collection included an ongoing dialogue with key contacts in each community area, culminating in a series of focus groups and personal interviews. Both secondary and primary data sources are listed in detail in Appendix E.

Refer to Section 5 and Appendix A for additional details.

2 PRODUCT ANALYSIS

The identification of tourism opportunities commenced with a product analysis to assess the existing tourism resources, operators, and communities in the study area. The findings of the analysis of resources and operators are summarized in this section, while the community analysis is included as part of the community tourism development profiles in Section 5. This product analysis featured a general assessment of the overall study area in terms of strengths and weaknesses, as well as a more detailed assessment of ten product areas on an individual product basis.

2.1 Overall Strengths & Weaknesses

This sub-section summarizes the overall strengths and weaknesses of the tourism products in the study area, and can be applied in general to all ten key product areas. It is anticipated that this list can provide some insight and direction for existing and new tourism operators, to capitalize on strengths of the area, and minimize the potential negative impacts resulting from area weaknesses.

Strengths:

- The pristine setting and natural beauty of the area combined with a quiet, relaxing environment enhances the quality of all touring experiences and outdoor activities
- Strategic location between Vancouver and the Rockies, and the lower US & Alaska
- Great fishing on beautiful, uncrowded lakes and streams
- Variety of outdoor activities facilitated in part by existing trails
- Numerous provincial parks
- Seasonal weather provides variety of activities to be offered i.e. product options
- Rich history in the area including the Gold Rush Trail, Quesnelle Forks, roadhouses and pioneer homes plus nearby heritage attractions (Barkerville and Hat Creek Ranch)
- Expanded trails system for outdoor activities, some connecting with lodges and resorts
- Extensive network of dormant logging roads for backroads exploration
- Good value for dollars spent relative to other competing travel destinations

Weaknesses:

- Inconsistent quality standards among operators which affects perception of the destination among past guests
- Insufficient signage and road maintenance standards on backroads to many operators
- Older properties may not be suited for changing travel markets
- Access links to certain properties
- High turnover in ownership/management and lack of related experience
- Low market awareness of destination and extent of things to do
- Unreliable weather
- Government restrictions limiting development of certain commercial activities (e.g. snowmobiling)
- Seasonality of business affects financial viability of operation

Please refer to Appendix D-1 for detailed operator responses by community area.

2.2 Key Product Analysis

As referenced earlier, ten key products were identified for closer evaluation in the product analysis. These ten were chosen by the study team, in conjunction with the steering committee, from a list of 45 provided by the MSBTC based on their knowledge of the existing and potential availability of product, market demand potential including target markets of key players in the marketplace, and local input.

The following summarizes the findings of the key product analysis. Details of the capability modelling were summarized in the following table, and each of the physical capability model maps by product is included in Appendix C-2. As referenced earlier, high or very high capability areas can be most simply defined as locations that contain the combination or concentration of attractors (features) with the physical capability to support a defined tourism product.

2.2.1 Freshwater Fishing

Fishing continues to be a very popular activity for locals and tourists in the study area, and has become synonymous with the lifestyle of the Cariboo. The thousands of lakes and extensive stream network provide many spectacular settings for fishers of all levels of ability.

The 23 largest 'very high capability' areas are highlighted on a study area map in Appendix C-2, with concentrations in the larger lakes (Quesnel, Canim, Green, Sheridan, Bonaparte, and Lac La Hache), along the Horsefly and Quesnel Rivers and Big Bar Creek, and around the towns of Likely, Horsefly, Lac La Hache, and 100 Mile House.

The larger and more easily accessible lakes with shoreside accommodation are popular with many novice-intermediate anglers and families, while the more remote lakes and rivers such as the Horsefly River rank as world-class for the most discerning angler.

Operators on several of the busier lakes have complained about low fish populations and requested better stocking to ensure that fish habitat is maintained and guests are not disappointed in "overfished" areas. A "catch and release" policy is being applied by more operators and guides, which serves to reduce the impact on fish stocks, particularly on the more popular lakes.

The "Lakes Classification Process" (LCP), currently being completed for the 100 Mile Forest District, is intended to provide comprehensive management direction which will influence the type of tourism product/s available for delivery (e.g. wilderness experience lakes will be identified). This is a positive indicator that the study area may be able to continue to provide quality lake fishing experiences in select areas. Resulting opportunities and constraints are discussed further in Sections 4 and 6.

2.2.2 Hiking

The study area offers excellent hiking/walking experiences due to the varied and spectacular terrain. The capability mapping revealed 23 'very high capability' areas spread across the study area, with the largest areas being found in the Interlakes, 108 Mile Ranch, Ruth Lake/Forest Grove, Horsefly and Likely areas. These are highlighted on a study area map in Appendix C-2. Local writer Colin Campbell identifies 45 hiking trails, almost all in the study area, in his book "Trails of the Southern Cariboo" -- several of which are also suitable for mountain biking and horseback riding. Many of these are rated "easy hikes" and well suited for the soft adventure market interested in walking in the wilderness.

Day hiking, or walking, for the soft adventurist, is often combined with wildlife viewing or photography and combining these activities with an informed guide can provide an even stronger product. Another popular combination is walking with mountain biking, which is being successfully marketed by upscale soft adventure companies.

Local recreation will bring limited returns to the region unless they travel and stay overnight in communities near the trail network. There will be some revenues generated through the purchase of related equipment. Guided hiking experiences usually cater to out-of-region visitors and will generate expenditures to local guide/outfitters as well as expenditures in the hospitality sector.

Hiking is also dependent on a trail infrastructure. Signage and ongoing maintenance is required. As with all of the trail-based activities, some mechanism needs to be in place to pay for ongoing maintenance costs. Hiking trails are less costly to develop than either skiing or mountain biking trails as they require only a narrow foot tread.

2.2.3 Wildlife Viewing / Photography / Natural History

For the purposes of this product analysis, these three areas were combined due to the similar criteria applied in the capability modelling process. In fact, each area represents a special interest area for large and lucrative market segments within the overall "soft adventure" market. The modelling revealed 23 "very high capability" areas (see Appendix C-2) with concentrations around large lakes, the Lac La Hache-100 Mile House corridor, the Interlakes, Likely, and Horsefly[1].

The study area offers world-class guest experiences due to the spectacular scenery, varied terrain, and richness of flora and fauna. Photographer/writer/guide Chris Harris has published a series of books on the Cariboo-Chilcotin which underscore the vast potential of this product for the study area. Local habitat includes land-based creatures such as bear (black and grizzly), moose, caribou, cougar, sheep (California bighorn), mountain goats, and mule deer, as well as over 200 species of birds and one of the largest salmon runs in the world. The birding offers a particularly exceptional inventory, and the numerous lakes and wetlands are a natural magnet for the migrating species.

Excellent back-country access is provided by the network of trails and backroads. This activity is popular year-round and particularly strong in the spring and fall season.

2.2.4 Snowmobiling

The study area includes some exceptional riding. The rolling terrain throughout much of the study area is popular for the trail-based touring snowmobiler, while the more mountainous terrain in the northern and eastern parts of the study area appeals to the more avid alpine rider.

The capability modelling identified 24 "very high capability" areas (see Appendix C-2) with the largest concentrations around the Lac La Hache, Interlakes, and Green Lake areas.

The riding season is typically December through to early March in the lower elevations, and this extends to November-May in the mountains.

Recent trail developments, spearheaded by local chapters of the B.C. Snowmobile Federation with funding support (from Forest Renewal BC and Community Enterprise Program), have sparked considerable interest among tourism operators and the momentum is building to develop this

[1] No wildlife data was available for part of the study area, therefore modelling results for that area were skewed.

product area, particularly the "snowmobile touring" segment of the market. The goal is to establish an integrated "trunk" trail to run north-south through the study area which connects with various towns and lodges, and form a link in the larger trail system between Kamloops to the east and Prince George in the north. Over 700 kilometers were complete by March 2000 including connections from Kamloops through Green Lake into 100 Mile with an optional route south to Clinton. The route north of 100 Mile House is expected to be complete this year and link the towns of Horsefly and Likely with Wells/Barkerville and Prince George.

Concerns have been raised as to the environmental impacts resulting from increased snowmobiling, particularly in alpine and sub-alpine areas with regards to the resident caribou population. The Inter-agency Management Committee is developing a snowmobiling-caribou strategy which will address this issue further and provide some guidance for future planning.

2.2.5 Destination Lodge/Resort

There is a wide variety of existing accommodation in the study area which provides an adequate base of activities and services for the guest, and several of which meet the traditional marketplace definition of a "destination lodge/resort" including guest ranches and full-service properties. The range in product and service quality at these properties is vast.

Many of the smaller properties, referred to as "mom and pop shops" due to the frequency in which they are family-owned and operated, offer rustic, cabin-style accommodation for guests who will "base" there for their holiday and explore nearby communities and area attractions. This has been a popular form of accommodation in the study area and other parts of rural British Columbia, particularly among cost-conscious travellers, families, and those interested in a rustic, "no frills" type of vacation in the country. The guest experience at many of these properties is often inconsistent due to regular changes in ownership resulting from lack of financial viability of the business. One of the main reasons for this, besides a lack of business experience and industry knowledge (particularly marketing skills) on the part of owners choosing the business more for lifestyle than profitability, is a flawed business formula: a small number of revenue generating units which are low-priced and only open for a short season. Added to this are escalating taxes and fixed operating costs associated with rising health and safety standards as well as increased competition and changing trends in an increasingly sophisticated and demanding marketplace. It is anticipated that these properties will continue to struggle to remain financially viable. Larger scale properties are in a stronger position to be financially viable due to economies of scale and increased revenue sources from more accommodation rental units, as are properties offering a longer operating season and additional on-site revenue streams.

All plans to consider a financially viable lodge or resort development in a new area should include a site-specific feasibility study which factors in implications of the CCLUP and SRP as they relate to the proposed location. In some situations, it is possible that logging activity will be seen or heard which may have an impact on the guest experience, and perhaps the property asset value.

A solid business plan and aggressive marketing strategy is critical. Moreover, the operator must be familiar with the extent of operating permits and licenses required for their business, associated fees, and the procedures related to obtaining these. Examples include building permits, liquor licenses, angling guide operating permits, park use permits, and operating permits under the Commercial Recreation Policy on Crown Land.

A further consideration of operators in remote areas is the challenges resulting from expensive or unavailable telecommunication services. Parts of the study area are reliant on either radio phone or satellite phone, both of which are not compatible with internet services. Cellular phone coverage is

limited, for the most part, to a small radius around 100 Mile House. These limitations have implications for operating logistics, safety procedures in the case of an accident, and marketing.

Based on the capability modelling, there are 27 "very high capability" areas scattered throughout the study area, mainly adjacent to lakes or other waterways (see Appendix C-2).

2.2.6 Nordic Skiing

Parts of the study area have developed and maintained networks of trail for nordic skiing. The 99 Mile-100 Mile House-108 Mile Ranch area in particular has invested in and developed world-class ski trails, and the area has become well known among the avid nordic skier market. The major investment was done 15-20 years ago and at a time when there was less competition -- both in terms of alternative destinations, and organized events. This has affected attendance numbers at the annual Marathon held in February, which is now seeing about one third of attendance numbers in the past. A current project of the 100 Mile Cross-Country Ski Club involves connecting the 99 Mile ski area with 100 Mile House at the Red Coach Inn is scheduled for completion this year (2000) and may stimulate more skier interest in this area.

The capability mapping showed a large number of 'very high capability' areas within the study area, with the largest areas and highest concentration of areas in the more rolling terrain found in the 100 Mile House Forest District (see Appendix C-2). As expected, areas around 108 Mile Ranch and 100 Mile House were very high capability due to existing trails and facilities; in addition, there were also large areas of very high capability in the Interlakes, near Lac La Hache, Clinton and Horsefly. The Interlakes area offers a combination of positive factors which indicate particularly strong potential -- a large concentration of lodges, higher elevation, and proximity to a service centre (100 Mile House).

Nordic skiing requires the development and maintenance of extensive (generally a minimum of 10 to 15 kilometers but usually much longer) trail infrastructure that needs to be signed and groomed regularly during the winter season. Due to the high maintenance costs, trail systems usually support summer uses such as hiking and mountain biking. Investment in trail systems has tended to be funded by government and community groups and may form part of a community economic development strategy. Most communities are struggling with issues of how to provide enough revenue to maintain the trail system in perpetuity and provide for winter grooming. Tourism may be looked on favourably as a way to fund trail maintenance, however there needs to a mechanism in place to apply revenues to trail maintenance.

There has been some trail development on private property, especially guest ranches that have substantial acreage. This requires considerable capital outlay on the part of the operator, especially if grooming equipment is purchased. This type of 'ski-from-your-door' facility is in high demand.

Nordic skiing is usually unguided on well-maintained and signed trail networks. Ski touring requires less trail grooming and may be done with or without a guide. In many cases, guided experiences will have more economic impact, although the local spending of recreationalists who travel within the region on equipment and transportation should not be discounted. Multi-day experiences utilizing lodges or huts are popular.

2.2.7 Horseback Riding

Like fishing, horseback riding is synonymous with the culture of the Cariboo. Ranching is a key industry in the study area, and the prevalence of working cattle ranches and large farms is obvious and appealing to guests of the South Cariboo. This cultural appeal is strengthened by its spectacular

setting and rolling terrain which covers a large portion of the study area. Over 25% of the study area rated 'very high capability' for horseback riding, with a large portion of this in the southern part of the study area where gently rolling terrain and open forests are prevalent. The 15 largest 'very high capability' areas are illustrated in Appendix C-2.

Horseback riding -- like hiking, mountain biking, nordic skiing, and snowmobiling -- is a means of transport as well as an enjoyable activity on its own. It provides the means to explore an area and enjoy other pursuits such as photography, wildlife viewing, and even walking where operators offer horse-assisted hiking with the provisions packed by horse and the guest is given the option to ride or walk. Operators offering horseback riding either maintain their own horses or work with a guide outfitter who provides the horses and equipment. The riding varies from one hour trail rides to multi-day pack trips to accommodate all levels of riders. Operators have had difficulties in obtaining affordable liability insurance with adequate coverage for riders, and most require that riders sign a personal liability waiver as a means of protecting themselves in the event of an accident. New operators offering horseback riding as an activity to guests need to be very clear on the extent and limits of available coverage as well as related costs.

2.2.8 Heritage / Culture

There is a rich gold rush history which has shaped many facets of the study area. Towns like 70 Mile House, 100 Mile House, and 150 Mile House were all named for their relative distance from Lillooet along a popular travel route to Barkerville, where thousands of prospectors headed in search of gold, following the 1849 Gold Rush in California. Quesnelle Forks, a deteriorating ghost town of about 20 buildings just west of Likely, provides the largest surviving legacy of this interesting era, along with the roadhouses and log cabins scattered throughout the study area. Museums in Clinton, Horsefly, and Likely also showcase archives and remnants of the gold rush era. Unfortunately, the lack of continuous support for the development of heritage tourism has resulted, in part, in the failure to preserve landmark sites such as Quesnelle Forks, the ineffective promotion of neighbouring heritage attractions (Barkerville and Hat Creek Ranch), and the need for under-funded non-governmental organizations to attempt to fill the void in this important area. The failure to address these shortfalls will result in a continued reduction in "historical product" and significant archives which will be lost forever.

There have been considerable local efforts applied recently to revitalizing the "Gold Rush Trail", which runs through the middle of the study area, and marketing the heritage tourism aspect of the Cariboo. This is being spear-headed by the Gold Rush Trail Development Co-operative, an impressive alliance of over a dozen "gold rush communities", Barkerville, and Hat Creek Ranch. This group, which has received funding assistance through the Community Enterprise Program and support from the Cariboo Economic Action Forum, is anticipated to be a catalyst in stimulating renewed interest in the gold rush history of this area. The Cariboo-Chilcotin-Coast Tourism Association (hereafter referred to as the CTA), has also contributed to the Co-operative and is a key catalyst for this, having recently appointed a cultural tourism coordinator.

An interesting joint venture between the community of Likely and members of the Soda Creek Indian Band is being considered which could result in a tourism project combining history of the gold rush era (1858-70) with the "pre-contact" era of the First Nations. A business plan has been prepared by the community and band, who were seeking funding assistance at the time of this report.

In addition to the gold rush history, there are several resident artisans and artists which comprise another element of the heritage/culture product. Projects in the study area include the

establishment of an arts centre in 100 Mile House, and expansion of the Flying Horse Gallery and museum in Horsefly. Several of the local artisans, attracted to the beauty of this area and quality of life, work from their home studios. Some are promoting their businesses to tourists through nearby fishing lodges and resorts. The studios and artisan shops provide an alternative activity for spouses of ardent anglers, and make for an effective combination. There is potential to increase the collaboration among these individuals and tourism operators.

Further to several key local initiatives, there are encouraging signs for this product area beyond the study area with the recent completion of a provincial strategy on cultural/heritage tourism commissioned by the MSBTC, building on the findings and direction outlined in the national strategy developed by the Canadian Tourism Commission.

For reasons mentioned earlier, there was no capability model for this product.

2.2.9 Lake Boating

The sheer number of lakes in the study area suggest tremendous potential for lake-based activities. While the study area boasts an exceptional number of lakes, the 21 major lake areas ranked as having 'very high capability' are displayed in Appendix C-2. The largest and most spectacular lake is Quesnel Lake located in the northern portion of the study area, which rated high overall in the modelling with very high concentrations mostly along the west arm. Houseboating was suggested as a possible development option which could potentially integrate with any marine park.

The issue of compatible use was raised in certain areas -- between either fishing and other motorized forms of water-based activities, or between residents and lodge owners. Fishing has been a popular activity on many of these lakes which may limit other compatible uses (e.g. jet-skiing or water-skiing) due to noise and other factors.

The weather results in seasonal use of lakes for boating between May and October. Most lakes freeze over from December through March and winter activities such as ice fishing, skating, snowshoeing, and nordic skiing become the main recreational use of lakes. Another factor which somewhat impacts lake use in the early summer (late May through early July) is the proliferation of bugs and flying insects, particularly mosquitoes. The severity of this varies among the lakes, and this factor was not raised as a weakness in the operator survey.

Canoeing has been included in this category and is large enough to warrant a separate analysis. The Moose Valley Canoe circuit west of 100 Mile House provides an exceptional two day experience, and a similar circuit just north of 100 Mile House has been discussed. Interest has also been expressed by the community of Horsefly to assess the feasibility of establishing a canoe circuit using a series of adjacent lakes in Wells Gray Park.

As referenced in Section 2.2.1, the Lakes Classification Process is expected to assist in identifying and managing quality lakes which offer the most tourism value. This, in turn, will support the ability of portions of the study area to continue to offer a variety of quality outdoor experiences in and around lakes. Existing and future tourism operators must continue to communicate with forest companies active in the area to ensure the quality of the setting is not compromised in terms of audio or visual impact. Operators should also work with the appropriate government agencies to ensure management of the resources and maintenance of the tourism opportunity.

2.2.10 Mountain Biking

The study area has hosted several highly competitive mountain biking events, and locals involved in

the sport say the Cariboo has some of the best riding anywhere in the world. The variety of terrain offers something for all levels of riders from novice to expert.

Numerous recreational trails suitable for mountain biking have been developed throughout the study area, most notably the "Adventure Series" project coordinated by the CTA with support from Forest Renewal B.C. and Human Resources Development Canada. These multi-use trails offer a strong emphasis on mountain biking and feature excellent quality maps available locally and on the internet[2]. Excellent mountain biking can also be found on networks of existing backroads and trails (often old resource roads) that link to make interesting or technically challenging loops. Signage is required and caution for oncoming traffic must be considered in these areas.

Due to the extent of trails and relatively low usage, concerns regarding environmental impact and conflicts with other user groups are not seen to be an issue in the study area. Local riders tend not to go out in damp conditions, when any potential impact is highest. Generally, less trail maintenance is required for this use than for skiing and hiking, as mountain bikers are often less deterred by obstacles on or around the trails.

Mountain biking is often an unguided day experience on marked trails, though there are opportunities to develop multi-day routes that can be packaged as guided experiences. This is currently offered in the study area and has potential to be expanded.

The capability modelling revealed a total of ten 'very high capability' areas for mountain biking, and these are illustrated in Appendix C-2.

[2] The "Adventure Series" maps can be downloaded from the CTA web site (www cariboocountry org).

3 MARKET ANALYSIS

Concurrent with this supply side analysis, the consultant team conducted a market analysis included a review of existing markets into British Columbia and the study area as well as speculation towards future markets in consideration of current marketing priorities and trends. This speculation goes beyond identifying pure market potential and attempts to further assess the market in terms of viability, in consideration of characteristics of the marketplace and the implications of these towards potential tourism opportunities in the study area.

In addition to three market areas identified in the project terms of reference, a fourth segment -- snowmobiling -- is assessed in closer detail given its recent product development emphasis in and economic potential for the study area.

3.1 Existing Market

There is a lack of study-area specific market data available, due to the chosen boundaries (consistent with forest districts vs tourism region boundaries) and an overall lack of tourism data at the local and regional level throughout the province. Due to this limited data, the existing market analysis refers to provincial as well as area-specific statistics, the latter provided by the South Cariboo Chamber of Commerce and the CTA.

3.1.1 Size & Economic Impact

Tourism revenues in the province reached a record high of $9.2 billion in 1999, according to Tourism British Columbia's year end statistics, with a 4.9% increase over 1998 generated from 22.3 million overnight visitors. Revenues and visitation increased in all major markets, most notably a 5.3% increase in visitation from the U.S. and a 12% increase from the U.K market. The Asia Pacific market increased by 8.9% led by double digit growth from South Korea (62%), China (32%), and Taiwan (29%).

Regional statistics for the Cariboo-Chilcotin-Coast tourism region are calculated based on an estimated market share of 3% of the provincial total, which equates to $276 million in 1999. The estimated value of tourism to the study area is $110 million, based on 40% of the regional total, or 1.2% of the provincial travel market.

In the study area, visitation to the Visitor Info Centre (VIC) in 100 Mile House totalled 20,913 in 1999, representing a 21% decline from 1998's total of 26,487. It is believed this was due in part to a reduced number of operating hours (1698 vs 1885) and inclement weather affecting a slow start to the tourism season.

3.1.2 Market Origin

According to the Visitor 95-96 Study conducted by Tourism British Columbia, the geographic origin of overnight visitors to the region, in order of size from largest after B.C. residents, is western Canada (31%), then regional U.S. (28%) followed by long-haul U.S. (15%), and Europe (14%) with the balance from the rest of Canada, Asia/Pacific, and Other Overseas.

42% of the visitors to the 100 Mile VIC were B.C residents, with 19% from Europe representing the

next largest market origin. This is representative of the high proportion of German-speaking tourists and operators in the study area.

3.1.3 Seasonality

The seasonality of travel to the region is more extreme than other parts of the province, with 71% of non-resident travel occurring in the summer, 9% occurring in winter, and 20% during spring and fall. There is less seasonal variance among the B.C. resident travel market.

This extreme seasonality was consistent with the VIC which experienced 72% of its visitation in the months of July-September.

3.1.4 Trip Purpose

The primary purpose of trip for visitors to the VIC in 1999 was sightseeing (33%) followed by outdoors/wilderness activities (20%), then Visiting Friends & Relatives (VFRs) at 15%. This was a slight change over 1998 which saw sightseeing and outdoors/wilderness activities each account for 34% of total VIC visitors, followed by VFRs at 15%.

3.2 Potential Market

The potential of two market areas -- ecotourism and adventure tourism -- are assessed in closer detail. Freshwater fishing and snowmobiling are also included in this more detailed assessment given the increased capacity in the study area, and the potential economic benefits to be realized from these segments.

3.2.1 Ecotourism

"Ecotourism" can be described as "responsible travel to natural areas that conserves the environment and sustains the well-being of local people"1.

Ecotourism in British Columbia generated $892 million in revenue in 1997 and employed more than 13,000 people, an 11-per-cent increase from the previous year2. No regional breakdown of these market statistics was available.

An indication of the overall size and nature of the ecotourism market in Canada and the U.S. is referenced in a 1995 study by HLA Consultants and the ARA Consulting Group titled Ecotourism - Nature/Adventure/Culture: Alberta and British Columbia Market Demand Assessment. The study estimates there are 13.2 million "ecotourism travellers" in just the seven cities3 surveyed in Canada and the U.S., with a potential market for British Columbia and Alberta ecotourism estimated at 1.6 million to 3.2 million visitors.

Based on the market profile described in the study, there is a very strong match with what this traveller wants and what can be offered in the study area. The most frequently mentioned factor of

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[1] The Ecotourism Society, web-site, March 2000

[2] Ministry of Small Business, Tourism & Culture, web-site, March 2000

[3] Chicago, Dallas, Los Angeles, San Francisco, Seattle, Toronto, and Winnipeg

importance to this market was summarized as "natural setting", which is consistent with the most frequently referenced strength identified by the tourism operators. The second most important factor was "activities", given the active vs passive nature of this market. The most popular activities of this market were wildlife viewing, walking/hiking, learning about cultures, and water-based activities including rafting, canoeing, and kayaking.

The aforementioned study also referenced the importance of parks and protected areas to this market, which again matches the product characteristics of the study area with the recent expansion of protected areas.

3.2.2 Adventure Tourism

Adventure tourism is described by the Ministry of Small Business, Tourism & Culture as "constituting a major growth sector of the tourism industry, outpacing every other sector of the Canadian economy"[4].

The market definition for adventure tourism and adventure travel is somewhat vague and tends to overlap with the ecotourism market; for example, it was included as a sub-market within the aforementioned ecotourism market study. According to the Adventure Travel Society, adventure travel is described as "any participatory human powered activity ...(which)... usually takes place in an outdoor setting.5

A closer look at this market reveals two distinct types of traveller -- soft and hard adventurer -- with distinct preferences in travel experiences. For the soft adventurer, the main attraction is the great outdoors as well as exploring and trying new things; hence, the specific activity becomes secondary to the setting and other things like service and food quality. This is fundamentally different that the "hard adventurer" who indulges in one particular activity and wants more to challenge and improve his or her abilities in that area of pursuit, after which the other elements of the travel experience have secondary importance to the activity. This distinction has significant implications in how tourism products are to be packaged and marketed. It affects the relevance of product weaknesses and constraint issues. It also provides the opportunity for a destination (or operator) to develop its product/s based on the needs of a chosen target market. From this perspective, a solid understanding of the distinction between these travel markets provides insight for future product development and corresponding marketing strategy development.

The recommendations provided in Section 6 address this point in the context of future actions.

Given the nature and setting of the tourism product in the study area as well as the extensive variety of optional outdoor activities, the study area offers a good product match for both the hard and soft adventure travel market segment.

3.2.3 Freshwater Fishing

Sport fishing is big business in British Columbia and appearing to be making a comeback following reduced activity in the mid to late 1980s.

Just over 5.6 million angling days were recorded in British Columbia in 1995, with growth in eight of

[4] Ministry of Small Business, Tourism & Culture, web-site, March 2000

[5] Adventure Travel Society, web-site, March 2000

the nine environment regions6. This growth is a reversal of an earlier trend between 1980 and 1990 which showed reduced angling days in most regions. The Lower Mainland has registered the most consistent and dramatic increase in use, from about 550,000 days in 1985 to over 900,000 in 19957.

In 1995, the Cariboo registered a 30% increase over 1990 figures, from 500,000 to over 650,000 days8, representing 12% of provincial market share. This is consistent with observations by the CTA that interest in this activity is growing with "catch and release" fishing vacations in particular becoming more popular, particularly with the higher-end resorts, and longer-haul markets.

While the freshwater fishing segment has tended to be less targeted by Tourism British Columbia compared to the saltwater fishing market, it is anticipated that this may change given the recent market growth. The CTA is considering it a high priority market and recently hired a "sport fishing coordinator" to build this market for the tourism region. This is discussed further in Section 4.1.

These efforts are expected to further stimulate demand for freshwater fishing in the study area.

3.2.4 Snowmobiling

Considerable market research has been compiled by the B.C. Snowmobile Federation into the economic impact of snowmobiling in parts of Canada and the U.S. The majority of statistics in this section reference their research.

Canada's existing share of the North American market is about 32%, representing $2.9 billion in revenue. The majority of this revenue is realized in Quebec, where an economic study on the "snowmobile industry" quantified the impact in 1997 at over $1.5 billion. Ontario maintains the second largest market share, and estimated that $932 in direct expenditures was generated by snowmobilers in 1998.

The current economic impact in B.C is about $95 million, or 3% of Canada's market share. Membership in local clubs has increased steadily since 1995, and snowmobile sales are up. About 24% of this is estimated to be generated from snowmobile tourists, snowmobile rentals, and tour operators.

This market segment represents a large and growing market offering excellent economic benefits, and is large enough to satisfy all of the trail-linked communities in the study area. The long distance touring market is particularly appealing in that the benefit can be realized by all the communities linked into the trails network, and there is a large enough market to encourage a collaborative rather than competitive approach among communities to marketing the area. The opportunities, along with related constraint issues, are detailed further in Section 4.

3.3 Beyond Market Potential to Market Viability

While assessing markets and their pure potential in terms of product-market matching is useful, it fails to address the realities of the marketplace including market priorities of key marketing players. In this market analysis, consideration has been given to the market viability aspect as it relates to the study area. Towards this, an assessment of current market priorities among key players in the

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[6] Cariboo-Chilcotin-Coast Tourism Association, March 2000

[7] Ibid.

[8] Ibid.

tourism marketplace can provide a useful indicator to assist in predicting future growth markets for the study area, despite limited marketing resources as discussed later in this section. The premise is that more emphasis equals more market development, and hence the more viable the corresponding opportunity.

Current marketing efforts at the provincial level include strong emphasis on the ecotourism and adventure travel markets. The provincial Economic Council of Ministers recently included ecotourism as a key component in provincial economic revitalization and diversification. A considerable amount of market research has been done into these segments and they are target markets for TBC.

In its current marketing plan being implemented in conjunction with TBC, the CTA has identified target markets which include Soft Adventurists and Ardent Anglers. Their product strategy includes programs dedicated to touring, freshwater fishing, and adventure. Geographically, emphasis is on the Pacific Northwest and continental U.S., U.K., German speaking countries in Europe, as well as Taiwan and China. Their marketing campaigns are designed to maximize their results, in part by building on the momentum being generated in the marketplace by other larger players including TBC, the Canadian Tourism Commission, and the larger receptive tour companies.

While the pure market potential for tourism in the study area is very strong, the realization of this potential is heavily dependent on effective marketing. The reality is that market development for the study area is severely limited due to an inadequate level of effective destination marketing. The low level of resources, effort and priority placed on marketing this area severely restricts the potential of truly realizing many of the opportunities that exist. Besides a lack of large corporate players (airline, motorcoach company, hotel chain, rental car company) investing in destination marketing, there is no receptive tour company and only one active organization with a mandate and (conditional) budget to promote tourism for the study area. This organization, the regional tourism association (CTA) is based outside of the study area and is also responsible for the promotion of a much larger area. The majority of their annual destination marketing budget is provided through TBC, and the matching nature of this program further limits their ability to market the destination (vs member properties).

This is in contrast to other competing destination areas throughout Canada and the world which have a substantial base of marketing investment to build demand for more and new tourism products. This growth in demand provides a strong incentive for product development, whereas the same efforts in the study area may run the risk of building it and hoping they will come. The reality of today's competitive tourism marketplace is that market demand can not be assumed nor taken for granted, and it takes cooperation, commitment, market intelligence, and substantial investments to get and remain competitive.

These marketplace factors are considered in determination of the subsequent key opportunities and constraints for tourism in the study area.

4 KEY OPPORTUNITIES

The product and market analyses support the fact that there are excellent opportunities for tourism development throughout the study area. This section describes nine key opportunities in general terms, with more details on each key opportunity by community area provided in the *Community Tourism Development Profiles* included in Appendix A. These opportunities are intended to stimulate consideration and further action towards the development of tourism in the study area among a number of various groups including:

- existing tourism operators interested in expanding or shifting their operational focus;
- potential investors and developers interested in tourism project ideas in the interior of British Columbia;
- economic development agencies and/or planners at the local and regional level; and,
- tourism organizations including the Cariboo-Chilcotin-Coast Tourism Association and Tourism British Columbia.

These opportunities were identified and prioritized based on their potential to maximize social and economic benefits, while minimizing the negative social and environmental impacts.

4.1 Happy Trails

The tourism opportunity offering the most potential benefits for the study area is the continued development and management of an integrated, year-round, world class, multi-use trails system. Diagram 4.1 illustrates some of the key trails completed and under development within this system at the time of this study. These trails are located primarily on crown land, and available for use on a non-exclusive basis as defined by the two government agencies responsible for issuing permits -- B.C. Asset & Lands Corporation (commercial recreation) and the Ministry of Forests (non-commercial recreation).

This multi-use system will eventually connect the study area with Kamloops in the east, Prince George in the north, and (for certain activities) Vancouver/Whistler in the south as part of a Canada-wide trails project. This will provide increased opportunities for hiking/walking, horseback riding, mountain biking, wildlife viewing, snowmobiling, and dogsledding and encourage guests to stay longer and spend more money in the area. It gives the accommodation operators more ways to promote their business, increase length of stay, and expand their operating season to include the winter. There is potential to manage environmental impact and minimize conflicts among different user groups including mechanized vs non-mechanized activities, locals vs tourists, and forestry vs tourism. It provides the option for guided and unguided experiences in addition to a variety of activities to choose from. The opportunity is for existing and new operators to tap into new markets, and support the development and maintenance of this system. This will also provide numerous new options to package multiple properties and promote lodge-to-lodge touring vacations.

Specific recommendations pertaining to this opportunity are included in the Community Tourism Development Profiles (Appendix A). In addition to these, private and public sector cooperation at a regional and provincial level could assist in trail planning, development, and management -- between communities and throughout the province. This coordination could also assist in addressing the

aforementioned points such as managing environmental impact and minimizing user conflicts to optimize the benefits to be realized from trail development.

4.2 Gold Rush Fever

As referenced in Section 2.2.8, the study area enjoys a rich gold rush history. The province's "Gold Rush Trail" runs north-south through the study area and is anchored by two provincial heritage attractions -- Barkerville and Hat Creek Ranch. There is an excellent opportunity to integrate community tourism development initiatives in Clinton, 70 Mile House, 100 Mile House, Lac La Hache, Horsefly, and Likely consistent with a gold rush theme. The Gold Rush Trail Development Cooperative, formed in 1999 to promote and develop this travel route, is working with these and other communities as well as several tourism associations on the implementation of a revitalization strategy[1] for the Gold Rush Trail. More details on specific opportunities are included in the respective community profiles in Appendix A.

4.3 Country Roads

Another excellent tourism opportunity for the study area is to take advantage of its extensive network of backroads, and develop new circle routes and travel itineraries for the more adventurous touring market. This includes a commitment to improve road conditions and maintenance standards as well as directional signage to operators and destinations.

The study area is well positioned to capitalize on this initiative, though proper consideration must also be given to ensuring traveller safety, particular on the more remote roads and those near active logging areas being used by industrial vehicles

4.4 Location, Location, Location

Another excellent tourism opportunity for the study area is to take advantage of its strategic location relative to popular touring routes in the Pacific Northwest. The two most prevalent of these are the north-south traffic between Alaska and the lower U.S. states, and the east-west traffic travelling between the Rockies and Pacific Ocean. The Gold Rush Trail development initiatives, referenced earlier will serve to increase interest among the north-south touring market. For the east-west traffic, the development of a destination area in the "Lakes District" (Loon Lake-Green/Watch Lake-Interlakes) would provide a strong incentive for travellers to pursue a more northerly travel route, and ultimately spend more time and money in the area. This area encompasses half way points between Vancouver or Whistler and Jasper which is too far to drive in a single day, and provide an alternative to the more popular route via Kamloops and Highway #5. The more things for the market to slow down and observe or do, the more time they will spend in the area. This opportunity also requires a commitment to improve road conditions and maintenance standards as well as directional signage to operators and destinations. Two key links are integral to the development of this opportunity:

[1] Currie Andrew & Co / Ecogistics Consulting, "Tourism Product Inventory & Marketing Plan: Final Report" for the Cariboo Gold Rush Trail Action Alliance, September 1999

4.4.1 Likely-Barkerville connection

Basically, this means better signage and an improvement of driving conditions on the Matthew River Road, which would create an exciting circle route option for the Gold Rush Trail and improved access to the major heritage attraction in the Cariboo-Chilcotin-Coast tourism region. This opportunity has been identified in previous studies, confirmed in community consultations, and prioritized in the economic development strategy for the Horsefly Forest District.

4.4.2 "Lakeland" connector:

The proposed connection would require improvement of the road linkage between Loon and Green Lakes, allowing the formation of a "lakes district destination area" which could position itself as THE scenic route between Jasper and Vancouver.

Similar to the Likely-Barkerville connection, this proposed link utilizes existing forestry roads and requires mainly signage improvements as well as current, detailed maps for travellers. This would be particularly effective should three of the community areas in this study -- Loon/Hihium Lake, Green Lake/70 Mile, and Interlakes -- combine efforts.

This opportunity area is detailed further in Appendix A.

4.5 Sell The Snow

There is a good opportunity to increase the level of winter tourism in the study area, due to favourable weather conditions, an increasing number of year-round tourism operators, and the recent expansion of multi-use recreational trails connecting the study area with Kamloops to the east and Prince George via Barkerville to the north. This trail expansion is intended to add to the winter activity base of excellent skiing, dog-sledding, snowshoeing, and ice-fishing.

At the Premier's Summit in May 1999 and a subsequent conference on economic development organized by the Cariboo Economic Action Forum in October 1999, snowmobiling was realized as a key priority for the area. Since this time, considerable funding support has been provided through Forest Renewal British Columbia and the Community Enterprise Program which has catalyzed trails expansion to a network of about 700 kilometres in the Cariboo. A series of constraint issues are also prioritized and are being addressed by the provincial government through the Land Use Coordination Office, who is working with the B.C. Snowmobile Federation. In addition to addressing these issues, proper consideration must continue to be given to the environmental implications of growth, particularly regarding snowmobiling and the local caribou population in the eastern and northern sections of the study area. It is believed by the consultant team that this issue can be adequately addressed through proper planning and monitoring of use, as has been implemented successfully in other areas of B.C., Canada, and the U.S. This issue is under detailed review by the Inter-Agency Management Committee, and a strategy is scheduled to be released in the near future.

4.6 Fishing

As identified in the Market Analysis, the study area offers an excellent product match with this growing market segment. Two key initiatives are expected to play strategic roles in the development of this product area and market segment.

The Lakes Classification Process, included in the 100 Mile SRP, and corresponding lake management strategies are expected to enhance the opportunities for fishing and related tourism activities. A diversity of fishing opportunities may be realized by tourism operators based on the resulting management direction from the LCP. The character of these opportunities will be determined by LCP direction provided pertaining to fish stocking, visual management, and access management.

The diversity of fishing opportunities in the Interlakes area will be further enhanced by the establishment of Key Fisheries Lakes through the 100 Mile SRP. In this area, lakes will be designated either for development or for wilderness experience.

The "Sports Fisheries Enhancement Program", being coordinated by the CCCTA, has an objective to dramatically increase the revenue realized from this segment over the next five years. Members of the working group are integrating findings of the LCP, and plan to promote those areas able to handle market growth.

The two initiatives are complementary in that one serves to maintain and develop product, while the other emphasizes market development in a sustainable manner. It is critical that continued commitment and adequate resources be applied to the implementation of the aforementioned lake management strategies. Presuming this is done, the study area will benefit from offering an exceptional diversity of wilderness experiences that include freshwater fishing in different settings with varying levels of access. This will be a powerful complement to the world-class river fishing offered in the study area, where a similar level of commitment is also required to ensure the long term sustainability of quality river fishing experiences.

In addition to these initiatives, a critical factor to enhancing the degree of success realized from product and market development is a proper monitoring, assessment, and management system to ensure sustainable growth of this lucrative segment. This includes determining and issuing the optimum number of angling guide licenses/rod days i.e. the level of commercial use which produces the highest overall economic return while maintaining a commitment to sustainable growth. In addition to addressing the increased environmental impact resulting from growth in this activity area, consideration must also be given to potential conflicts with local users and the impact of increased visitation on the guest experience. This is identified again in Section 6.

4.7 Links & Packages

There is an excellent opportunity to link existing suppliers and create new product packages for the ecotourism and outdoor adventure travel markets. The market opportunity for and desire to create new products by packaging existing suppliers in new ways was reinforced throughout the study in both secondary data analysis as well as in consultations with operators and the marketplace. Examples include offering trail map information with promotional material and suggested multi-day programs, combining two compatible activities such as hiking (call it "walking" for the soft adventure market) and mountain biking, and creating suggested itineraries based on special themes such as birding, the gold rush heritage, and an art drive complement to the successful art walk program.

4.8 More Pipes

There are several good reasons for existing and new tourism operators to build strong working relationships with the travel trade (product resellers), or "more pipes to the market". For one, pre-booked travel is not weather dependent which was one of the most frequent operator responses to

product weaknesses. For another, advanced bookings simplify operational planning and staff scheduling. A third advantage is that remuneration is commission-based and, unlike consumer advertising and promotion, the tourism operator only pays when the business is booked.

There is an extensive network of travel brokers (receptive tour operators, adventure tour companies, travel wholesalers, travel agents, destination management companies, etc), who are usually looking for new products.

Both of the two previously mentioned opportunity areas are key elements in the marketing strategy of the CTA and TBC. The most effective way to develop these opportunities is in collaboration with them.

Many operators and businesses could benefit from the presence of an experienced receptive tour operator (RTO), based in or near the study area, who would package lodges, guest ranches and activity-based operators for small coach tours or other organized groups. Several operators who have experimented in organizing activities for their clients indicated that the current clientele is not willing to pay the going rate for day long activities (e.g. jet boat rides and gold panning on the Fraser, day long horseback trips). Tapping into select international markets in partnership with an RTO would allow existing tourism operators to develop a market for these activities.

4.9 Capability Clusters

Locations within the study area which rated *high* or *very high capability* (defined in Section 1.3.4) in most or all of the key product areas are likely to hold more potential in terms of tourism opportunity, at least in terms of flexibility and variety of activities to be offered to guests. This allows the operator to select or revise the "product" in response to changing markets and trends.

In order to define these areas, a comparative analysis of the nine capability models was done. This led to the identification of a number of places where there was overlap between models, or "capability clusters". The results of the capability modelling are summarized in the table on the following pages which describes geographic areas of high/very high capability by product type.

Five areas rated "very high capability" for all nine product/activity areas, listed as follows:

- Quesnel Lake – Mitchell Bay
- Likely & area (including outflow of Quesnel Lake)
- Deka Lake area
- Bridge Lake
- Bridge Creek area

An additional 19 areas registered at least high in all nine categories and very high capability in seven or eight of the product/activity areas, listed as follows:

- Cameron Ridge
- Keithley Creek
- Quesnel Lake -- south central
- Quesnel Lake -- tip of eastern arm
- Horsefly-Horsefly Lake corridor

- Black Creek
- Lac La Hache
- Timothy Lake (east side)
- Eagle Creek
- Canim Lake (southeast)
- 100 Mile House area
- Sheridan Lake (east & north)
- Bridge Lake (north)
- Rayfield River headwaters
- Eagan Lake
- Green Lake (northeast)
- Loon Lake (southeast)
- Denman-Vidette River confluence
- Bonaparte Lake outlet

Refer to Diagram 4.9 for a detailed map of these capability clusters.

5 COMMUNITY TOURISM DEVELOPMENT PROFILES

The identified tourism opportunities must be considered within the context in which they will be developed. In many cases, communities, either directly or indirectly, will be involved in tourism project development. This could be in a supporting role through advocacy or enabling economic development initiatives, or in the case of incorporated communities, more directly through land use planning such as zoning or development permit applications. The suitability of each opportunity has been passed through the "sieve" of community objectives and priorities.

The community tourism development profiles are intended to be a tool for community priority setting by identifying the tourism opportunities that, if pursued at this time, are the most achievable for the community and will bring the highest return. They include:

- a community overview, including any strengths and weaknesses relevant to the community polygon as identified in the operator survey, community planning documents, consultations or other sources of SWOT data;
- a discussion of the key opportunities including any threats or suitability issues identified in the above sources; and,
- some suggested 'next steps' that indicate how the community can proceed with the development of the opportunities and indicate what benefits or impacts would accrue from that development.

The study area was divided into 9 community polygons as follows:

- 100 Mile House (including 108 Mile Ranch and Horse Lake)
- Canim Lake (including Forest Grove)
- Clinton
- Green Lake (including 70 Mile House)
- Horsefly
- Interlakes
- Lac La Hache
- Likely
- Loon Lake/Hihuim Lake

The boundaries of these polygons are identified earlier in the study area map (Diagram 1.2). A complete listing of tourism operators within these polygons can be found in the accompanying database listed in Appendix B-2.

The largest centre within the polygon is in most cases the 'community of interest' in regards to the proposed tourism opportunities. It is the community that will benefit if the opportunity is developed; it is also the community that must bear any impacts of that development.

For each community polygon, areas of very high capability for multiple activities were identified.

Refer to the map folio for the capability modelling of individual products (Appendix C-2) and multi-product "capability clusters" (Diagram 4.9). These opportunities were further investigated on the basis of the product analysis as described in Section 4, and factoring in responses to the operator survey by community area (see Appendix D). A series of key informant interviews and community consultations provided additional information about opportunities.

Key opportunities identified in each profile were chosen on the basis of their suitability for the community and on the basis of social criteria which considered the community's attitude towards tourism development, the existence of the necessary physical infrastructure, the community's organizational capacity and available human resources. The results of the project capability mapping were checked as well. The opportunities along with the suggested 'next steps' provide communities with new development ideas or verification of existing ideas. Only those opportunities that are seen as achievable by community members have been chosen. Opportunities were also selected on the basis of the projected economic spin-off they would provide to the community.

The CCLUP will impact tourism development in the study area. Diagram 5.0 indicates the CCLUP zones and sub-zones in relation to the boundaries of the community polygons. Tourism and recreation targets have been set for each sub-zone. These include maintaining the visual quality around existing tourism operations; maintaining the visual quality around certain key lakes, highways, river corridors and communities; and maintaining a certain percentage of the polygon in backcountry condition. In general, tourism targets are stronger in the Integrated Resource Management and Special Resource Development Zones than in the Enhanced Resource Development Zones and sub-zones, and may include targets to promote tourism development within the specified backcountry areas or already designated visual management zones. Tourism development outside these areas can expect to see modifications in the surrounding landscape or be otherwise impacted by other resource industries.

The seven new Goal Two Parks identified in the SRP for the 100 Mile Forest District will provide additional tourism opportunities. These smaller parks provide protection to special features and often provide excellent birding or wildlife viewing opportunities.

Not surprisingly, a number of similar products were identified for several communities. Rather than this resulting in communities competing against each other, this situation can lead to creating a "critical mass" of specific products that will give the study area wider recognition. To achieve this, communities can work together on joint promotional activities. Within this framework, communities can identify what is particularly unique about their area that sets it apart. An example of this is snowmobile touring. With the development of the overland snowmobile route between Kamloops and Prince George, many communities, lodges and resorts can tap into this opportunity. Working together to promote a full range of experiences (lodge-based, lodge to lodge, community-based day trips, combinations with fishing, dogsledding, etc) increases the overall appeal of the product. When that recognition has been gained, each lodge or community must find its unique niche within the mix of products.

The Gold Rush Trail is another example of a touring product that crosses through several of the community polygons. Communities and attractions along the route must each find their own unique part of the gold rush story to tell the visitor, while working together on the larger project of making the Gold Rush Trail a well-known international touring route.

It is hoped that communities are able to use the profiles as a tool to suggest potential actions for tourism development. Refer to Appendix A for the Community Tourism Development Profiles.

6 CONCLUSIONS

This section includes a summary of the key issues and constraints affecting tourism in the study area, followed by recommendations and a concluding statement about tourism planning.

6.1 Key Issues & Constraints

Many issues continue to plague the tourism industry and restrict what otherwise seems to be endless opportunity for tourism development in British Columbia and the study area. Some of these issues are relevant across Canada, and are being addressed by the Canadian Tourism Commission through an initiative which calls for the "promotion of a climate for development". The four issues they have prioritized are access, financing, regulations, and taxation; all of which were raised as key issues affecting tourism growth and operator viability in the study area and will be described further in this section.

In B.C., the Council of Tourism Associations held a planning workshop in February 2000, in conjunction with the annual Tourism Industry Conference, to identify the key issues facing the tourism industry. The two top issues identified were land use and marketing, also consistent with findings in the study area.

In addition to these six key issues, the detailed responses from the tourism operator survey regarding the question of "threats" to their sector and industry provide further insight into industry constraints, and are detailed in Appendix D-1.

6.1.1 Land Use

The issue of land use planning and resource management has been an expressed concern of the tourism industry in British Columbia for years. This complex issue encompasses various aspects including operator concern regarding future security and costs to operate commercially on crown land and in parks, and uncertainty of tenure based on implications of aboriginal land claims. The most important aspect pertaining to tourism opportunity identification and development is regarding the implications of land use planning decisions, as discussed further in this section.

The CCLUP, as implemented through the SRPs, directs future tourism development to areas established for visual management and backcountry recreation. New operators offering product/s dependent on more natural settings and features should utilize these established management areas. This pertains primarily to the potential impact of timber harvesting on a natural setting, a key element in the tourism product as alluded to earlier in this report. While the views from existing resorts and lodges must be maintained, there is no assurance of the same for new operators outside established visual management areas. This, in turn, restricts the number of suitable locations to establish a tourism business dependent on the visual quality of its setting.

Further restrictions on tourism use are applied in the protected areas, also identified in the land use plans. Park use is determined by management plans prepared by B.C. Parks. Despite direction from the CCLUP to accommodate future tourism development in the new protected areas, B.C. Parks must balance conservation with commercial needs. This is predicted to be a major limiting factor to tourism development in the study area, without:

- an effective means to measure and monitor an acceptable level of use i.e. establish and manage proper carrying capacities; and
- a collaborative planning approach with tourism/recreation planners to ensure optimal, sustainable use of these areas.

A specific recommendation to this effect is included in Section 6.2.

6.1.2 Marketing

As referenced earlier in this report, marketing was identified as one of the two top issues of concern among the tourism industry of British Columbia. There is a general attitude among many tourism operators that the government and other organizations should be doing more to promote tourism in the rural parts of the province, and that too much emphasis is placed on marketing just the "golden triangle" of Vancouver, Victoria, and Whistler.

The growing competition in an increasingly sophisticated marketplace requires strong skills in marketing as well as a thorough understanding of the tourism industry and distribution channels. The study area and Cariboo region, like other parts of rural B.C. and Canada, are low in the awareness level of many potential travel markets. Existing travellers to and through the region are seldom aware of the diversity of things to see and do. In addition to a low overall awareness, those travelling to and through the area are limited in what to do and see in the area due to lack of information services and sources such as those offered by VICs. Of the nine communities in the study area, only one offers a VIC recognized and supported by TBC. The lack of this type of service results in lost revenue and absence of a key service for guests staying in the area.

6.1.3 Access

The proper maintenance of backroads to existing properties, including proper signage, as well as strategic expansion of travel corridors to provide new circle routes and touring itineraries are critical to the realization of tourism opportunities and the successful growth of the industry in the study area. The extent of unpaved roads deters a considerable portion of the touring market, and many rental vehicle companies do not permit their vehicles on unpaved roads. Air connections are limited and scheduled air service into the study area, when available, has been expensive. This lack of a consistent, scheduled air service makes it more difficult for the travel trade to package and sell these properties. Passenger train service is provided three times a week by B.C. Rail, which is a reduction in the number of scheduled departures prior to 1996, due to low load factors and the termination of an operating subsidy from the government. This reduction also makes the booking of travel more difficult for operators, the travel trade, and/or traveller as they must design their trip around this schedule.

6.1.4 Regulation

The range and extent of permits and paperwork required of tourism operators, most of whom are small business owners, can be overwhelming. Many smaller operators have given up trying to comply with all the regulations, and others have elected to retain consultants to assist with meeting these requirements. Examples include onerous application/approval processes for operating permits vital to an operator's ability to deliver their product/s such as park use permits, licensing under the Commercial Recreation Policy on Crown Land, and angling guide licenses. Operators also

expressed frustration with the building permit/inspection process when upgrading or expanding their properties, and complained about inconsistent interpretation and enforcement of provincial policies/regulations at the regional level.

The fact that these processes are administered by different government agencies results in duplication of efforts among both applicant and recipients. In order to eliminate one such area of duplication, the Williams Lake office of B.C. Assets and Lands Corporation standardized part of its application form with that of BC Parks' application for Park Use Permits. Now, tourism operators applying for both types of permits are able to include the same management plan with each application, thus saving the operator time and unnecessary effort. This is a good example of the type of initiative which can be taken by key government agencies to coordinate efforts and produce a workable solution. More of this type of initiative needs to be taken, as referenced in a specific recommendation in Section 6.2.

6.1.5 Taxation

The number of taxes and their impact on the cost of travel and related products and services are perceived by many tourism operators as a deterrent affecting tourism demand. Operators feel they are overtaxed and get little if any services in return. The annual property tax is due at a time (July 02) when many seasonal operators have nominal cash flow given their business cycle. Other specific complaints included devastating increases in property taxes on leased crown land, user fees (business license, liquor license, angling guide operating permit, CR fees, park use permit fees, etc), and taxes on items including gas, alcohol, and cigarettes.

6.1.6 Financing

Tourism businesses are generally perceived by the financial community as high risk investments due to seasonality, poor management, and small size; therefore, access to development and operating capital in the study are is constrained.

Recognized as a critical issue for tourism across the country, efforts are underway by a working committee of the Canadian Tourism Commission to address this issue. One recent outcome of this group is a 97 page document titled "A Road Map to Tourism Financing" intended to provide assistance for existing and new tourism operators in accessing financial assistance.

6.2 Recommendations

The following recommendations are provided to support the identified opportunities stated in Sections 4 and 5, and address the issues and constraints summarized above. Each recommendation includes a reference in <brackets> to suggested organizations to take the lead in follow-up. A list of the acronyms is included at the end of this section.

- Tourism developers interested in the study area are encouraged to look at the areas with very high capability in numerous activities (while appreciating the limitations of the capability modelling methodology), as well as locations adjacent to the trails system. They are also encouraged to be aware of land use plans (CCLUP and SRPs) and the implications for their area of operation, particularly those offering product/s dependent on secure visual conditions. New operators and existing operators planning to expand should be aware of

identified *visual management* and *backcountry* areas and, where possible, utilize these areas. <Tourism operators, MSBTC, BCAL, CTA>

- Give high priority to the development, maintenance, and marketing of an integrated, year round, multi-use trails network linking communities and resort operators as a key infrastructural base for year-round adventure tourism in the south Cariboo. This includes funding support and commitment to resolve constraint issues in a satisfactory manner. <CEAF, CCTS, 100 Mile Trails Foundation, CTA, MSBTC>
- Commit to the preservation, showcasing, and promotion of the area's gold rush history:
    - Immediate action should be taken to preserve Quesnelle Forks and save the buildings at peril due to the erosion of the river bank. This action should be taken in collaboration with the Likely & District Chamber of Commerce and its Restoration Project Committee, who have prepared a detailed document which includes an option to temporarily move several buildings away from the most volatile area. <MSBTC, GRTDC, Likely Chamber of Commerce>
    - Consideration should be given to support a proposed community development concept including the restoration and management of this heritage site through a partnership between the community of Likely and Soda Creek Indian Band which involves expanding the "gold rush trail" story to include pre-contact history of the area. A detailed business plan has been prepared and should be explored further as part of an overall tourism development strategy for the Likely-Quesnelle Forks area including the connection to Barkerville. <MSBTC, GRTDC, Likely Chamber of Commerce, Soda Creek Indian Band>
- The Commercial Recreation Policy on Crown Land, its terms, and benefits need to be communicated more clearly and administered in a timely manner to tourism operators. It is understood that BCAL is developing a communication strategy and that the regional office is available for informational presentations. The CTA needs to play a role in this communication strategy and assist in facilitating a better understanding of this policy, its terms, and benefits. <BCAL, CTA>
- Regarding fees for commercial use of crown land, operators need to accept that there will be a charge when they benefit financially from this use. It is believed this will be more easily accepted if BCAL ensures satisfactory terms and conditions for the operator. <CTA, BCAL>
- Continue efforts to streamline tourism operator requirements in the areas of permits, licenses, and other operating requisites, following the good example set by the provincial government with the B.C. Access Centre network. <MSBTC>
- Ensure that a consistent standard be applied to the lakes classification process in order to provide adequate opportunities for freshwater fishing and tourism use in the future. <IAMC>
- Commit to an adequate budget and staff team to implement the lake management strategies as established through the Lakes Classification Process. <MELP, MSBTC, BCAL>
- Commit sufficient funding to maintain and enhance fish stocking programs and similar management programs to sustain fish populations in high use areas. <MELP, MAFF>
- Address the need to balance environmental and socioeconomic carrying capacities beyond the LCP. <MSBTC, MELP, MAFF, BCAL>
- Ensure that adequate resources are allocated to the proper planning and management of all protected areas, which will continue to gain appeal as demand generators and "tourist attractions" for the ecotourism and adventure markets. Towards this, an effective means to measure and monitor an acceptable level of use (i.e. establish and manage proper carrying

capacities) is critical, as is a collaborative planning approach with tourism/recreation planners to ensure optimal, sustainable use of these areas. <MSBTC, BC Parks>

- Prioritize the cultivation of a "climate for tourism development" consistent with the definition of the Canadian Tourism Commission, as referenced in Section 6.1. <CTA, COTA, CTC>
- Develop a signage master plan with MOTH and MOF to address concerns regarding lack of directional signage and minimize highway clutter. <MOTH, TBC, CTA, MOF>
- Implement a tourism access management strategy to including upgrade of existing road connections to support and grow tourism in the region. <MOTH, MOF, MSBTC, NDC, CTA>
- Work to improve relations between forestry and tourism and foster a better understanding and level of respect among the two industries, perhaps by way of a pilot project to establish procedures which resolve future land and resource use conflicts. <MSBTC, MOF, COTA, COFI>
- Assess options to improve/coordinate air connections to remote lodges, lower costs by running fuller planes, and offer a scheduled service to stimulate more travel trade business. Options could include individual lodges negotiating arrangements with an air carrier, establishing a hub area, or operating a centralized reservation service which allows lodges to share seats on flights. <HRDC, CEAF, CTA>
- Establish a mechanism whereby seasonal tourism operators can apply to defer their annual property taxes by 30 days for cash flow purposes. <CTA, COTA>
- MSBTC and Tourism British Columbia need to work more closely in tourism planning, bringing together their combined product and market intelligence. This would foster a more integrated approach to product development strategy in consideration of market characteristics and issues, and market development strategy in consideration of product availability and supply-side issues. The two organizations could also collaborate to improve awareness and recognition of tourism throughout government. <MSBTC, TBC>
- Above all, manage for positive, sustainable tourism growth in consideration of social, economic, and environmental factors by maximizing the positive benefits and minimizing the negative impacts resulting from industry growth and change. <MSBTC, CTA, TBC>

List of Acronyms:

BCAL	British Columbia Assets and Lands Corporation
CCTS	Cariboo-Chilcotin Trails Society
CTC	Canadian Tourism Commission
CTA	Cariboo-Chilcotin-Coast Tourism Association
CEAF	Cariboo Economic Action Forum
COFI	Council of Forest Industries
COTA	Council of Tourism Associations
FRBC	Forest Renewal British Columbia
GRTDC	Gold Rush Trail Development Cooperative
HRDC	Human Resources Development Canada
IAMC	Inter-agency Management Committee
MAFF	Ministry of Agriculture, Food & Fish

MELP	Ministry of Environment, Lands and Parks
MSBTC	Ministry of Small Business, Tourism & Culture
MOTH	Ministry of Transportation and Highways
NDC	Northern Development Commission
SRP	Sub-regional Planning Team
TBC	Tourism British Columbia

6.3 Epilogue

Despite healthy growth and a substantial contribution to the provincial and regional economies, there continues to be an extreme lack of public investment into tourism planning throughout the province, resulting in serious challenges for both existing and future tourism operators. To draw one comparison which illustrates the severity of this shortage in planning resources for tourism, the Ministry of Forests currently employ about 4,300 full-time employees (FTEs) compared to about 85 in tourism, and of this latter number, the majority are employed by Tourism British Columbia, whose mandate is to promote tourism.

The implications of this void in planning impact the present and future opportunities for the tourism industry in the study area and throughout the province. One example is in the lack of tourism interests being represented in various land use planning processes at the regional and community level. Another is in the limited amount of available data at the local and regional level, necessary to make proper planning decisions. Another is the inability for the Ministry of Small Business, Tourism, and Culture to maintain a consistent strategic direction due to the need to tap into changing programs with varying eligibility criteria, as a means of subsidizing an inadequate operating budget to manage a large and growing industry.

The opportunities for tourism in British Columbia have been, and will continue to be, severely restricted if there is not a correction to this fundamental flaw in the tourism system of this province. It is recommended that the provincial government take immediate steps to address this and increase their investment into the proper planning of this important and growing industry. Specifically, it is suggested that the operating budget of the Policy and Land Use Branch be expanded to accommodate an increase in the number of full-time employees in this branch of the Ministry to 50 individuals -- a base planning team of 15-20 individuals based in Victoria including a liaison for Tourism British Columbia, and six field teams (4-6 individuals each) based in each of the six tourism regions. These field teams would work with the regional tourism associations and respective line ministries to address and resolve some of the many issues towards the cultivation of a climate for tourism development. They would be able to work more closely with Tourism British Columbia to integrate their respective databases of information -- tourism resource inventory and tourism product database -- and apply yield management concepts to selling tourism. They would also integrate economic, social, and environmental aspects to support the sustainable growth of tourism.

Tourism has the potential to be as destructive as any other industry when poorly planned. The time is now to invest in the proper long term planning of tourism in British Columbia to minimize the negative impacts and maximize the positive results of its continued healthy growth.